# CCH iFirm<sup>®</sup>

## **Client Portal**



Streamline your client communication, by securely and efficiently sharing documents with clients online. Wherever your clients are, connect with them easily and securely, on a contemporary platform, which boosts efficiencies across the board.

From simple document sharing to secure digital signing, there's never been a safer way to communicate with your clients.



#### The easy way to work

As more firms seek to engage with clients remotely, CCH iFirm Client Portal provides an easy-to-use, secure channel to share data, reports or documents for review or digital signing with clients. As the status of each document is shown, you can tell at a glance whether it has been opened or signed by your client.



#### **First-class encryption**

For your peace of mind, CCH iFirm Client Portal employs the very latest in tried-and-tested security innovation, which means you know that whatever it is you're sending, sharing or saying, you can be absolutely confident that no-one else is intercepting or viewing your material. For additional security, you can use multi-factor authentication within the portal, ensuring privacy and security are of utmost priority.



#### Intelligent integration

CCH iFirm Client Portal integrates with CCH iFirm Signatures to facilitate digital signing of documents as well as the Contacts, Practice Management and Document Vault modules.





CCH iFirm is an award-winning, cloud-based suite of unified practice management and compliance tools for your firm.

- ✓ Practice Manager
- ⊘ Client Accounting
- 🕑 Tax
- ♂ CGT Reporter
- ⊘ Document Vault
- 🕑 Client Portal
- 𝔄 Signatures
- 𝕑 Web Manager

"This seamless integration of applications in CCH iFirm saves us significant time in our levels of reporting and client service. We have eliminated unnecessary duplication and made it even easier to manage projects and proactively communicate with our clients at the same time. This can also happen anywhere – which is entirely essential to the growth of the modern workforce."

#### Phil Marendaz Managing Director, Marendaz Accountants & Business Consultants

Available as a standalone solution, or fully integrated with CCH iFirm and CCH Signatures tools.

۲	CCH iFirm	TA NZ Test eS	Sign 1					
ស	Home	Client Portal						
	Jobs	~	Client Details Name Example Company Lir	mited		View Client		
8	Contacts	~	Code 12345	Type Company				
٢	Time and Billing	~	Client Type Business					
ß	Documents		Post-Newsletter No					
Q	Client Portal		Client Portal Subscrit	hers				
	Reports	$\sim$				Edit Subscribers		
	Intranet		Janice Example		JaniceExample@mail2newzealand.com			
m	Team Directory		John Example		johnexample@gmx.com			
			Jane Example		janeexample@gmx.com			
\$ <u></u>	Settings	~ 11						
<u>=</u>	Task Centre		Portal Space Usage (1	Last Generated : Nov	09 2022 11:17 AM)			
B	CCH Entities		133	1.52 1.97 1.26				

Client Portal dashboard in CCH iFirm

🔹 CCH iFirm	TA NZ Test eSign							۵ 📟 🔇	
Home 6		Client Portals							4.
lobs	×.	Active Portals	Portal Subscribe	55					
Сольная	~	Q Search (	ient Name 🛩	for					
Time and Billing	~	Show Portal Data	Size	Grand Total: 13.09 MB (Active Portais) 0.0 (Archived Portais)					
Documents		Delete		0 B (Inactive Portals) 0 B (Inactive Portals)				Multiple Po	rtel Upload
		0.0	lient Code	Client	Partner	Manager	Subscribers (Pending)	Size	
Client Portal		0 0	001	Example Company Limited			3 (0)	10.60 MB	8
Reports	~	0 1	302	Example Company Limited 2			1 (0)	284.02 KB	13
			303	Example Company Limited 3			2 (0)	893.03 88	- 10
Intranet			304	Example Company Limited 4	Administrator	Administrator	1(0)	0.8	10
Team Directory		0.0	005	Example Company Limited 5			4 (0)	1.26 MB	- 10
							Total	13.09 MB	
Settings	× 1								
Task Centre									
COH Entities									

#### Easy to view all your client's portals

Home	My	Invite to Portal				
My Details	My Documents - Jane Smith					
My Documents	Jane					
Unread Files 2	Туре	Name	▼ Status	Date Modified		
Invited	î	(back)				
Portal File Search		Tax return 2022	New and waiting for 2 (2)	May 18 2022	Sign Now	
1		Engagement letter 2022	New and waiting for 1 (1)	Nov 08 2022	Sign Now	
	1	Electronic lodgement declaration (ELD)	Viewed and waiting for 1 (1)	Dec 08 2021	Sign Now	

Client view of CCH iFirm Client Portal

### Request a demo today 🗲

